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To: County Board Chairs  
County Administrators/Executives/Administrative Coordinators  
County Department of Community Programs Directors and Financial Managers  
County Department of Developmental Disabilities Services Directors and Financial Managers  
County Department of Social Services Directors and Financial Managers  
County Department of Human Services Directors and Financial Managers  
County Aging Unit Directors

From: Rich Kammerud, President, WCHSA  
Craig Thompson, WCA Legislative Director

Throughout the fall of 2002, a group of County Human/Social Service Directors and staff from Wisconsin Counties Association, facilitated by Gerry Born, met to develop a proactive solution to the funding of the current County Human Services System. The outcome of this effort is now being called "Visions"; A Proposal to Redesign Wisconsin's Human/Social Service Delivery System. The Visions model is designed to align taxing and spending decisions in local human services and to provide accountability to taxpayers and consumers by funding services based on actuarially determined rates with an agreed upon percentage split between the state and the counties. Shortages in available state funding would be dealt with by adjusting eligibility of persons for services, rather than, as in the current system, underfunding promised services.

Following support of the Visions proposal by Wisconsin Counties Association and Wisconsin Counties Human Services Association, a Steering Committee of State, County and advocacy representatives was formed to address how to move the Visions proposal forward. Two sub-committees of the Steering Committee (Data Reporting and Transitional Funding) are now addressing funding considerations in transitioning to Visions and collecting consistent statewide data to inform the funding discussions.

One of the stumbling blocks to even preliminary discussion of Visions is that we do not know how much state or county money is being spent in the current system. Current reporting instructions have not been revised for years and counties interpret the instructions in different ways. Since most counties put a considerable amount of "overmatch" dollars into human service programs, the accuracy of dollars spent over costs reimbursed by the state has not been viewed as relevant by many counties. With more state agencies to report to in recent years, the overlap/reconciliation among those different reports has increased inconsistencies in reporting.

The Visions Steering Committee has determined that using reports previously submitted by counties to obtain state and county funding levels will not yield accurate data. Therefore, we need your assistance in doing a one-time survey to determine actual expenditures and revenues. We are aware that a survey based on one year of operations has only limited usefulness because of variability in costs from year to year.

**Therefore, we are asking for data for a three year time period.** We are asking for 2003 expenditure data to be broken out by target group and by source of revenue. For 2001 and 2002, we are requesting total expenditures by source of revenue only (not by target group), but ask that you provide these totals for all of the same target groups included in the survey for 2003. We encourage you to be as accurate as possible in reporting costs using the most accurate cost allocation systems you have.

Although the attached survey forms look similar to the 942/943 or 875 reports you have done previously, we have clarified the definitions of target groups and revenues sources, and included expenditures previously excluded on some reports such as Corrections, Income Maintenance, Aging, Child Care Administration, Energy, and General Relief. Therefore, this survey will vary from your previously submitted 942/943 reports or other reports of expenditures. The attached Instructions and Definitions clearly describe what is to be included, so please review this document before completing the survey forms. The WCHSA Conference and Financial Managers Conference in early May will each include a Visions Workshop that will review this survey and provide an opportunity to ask questions. The Visions Data Reporting and Transitional Funding Workgroup will also revise the 942/943 and 875 report for 2004 based on the revised instructions and definitions for the survey.

The first purpose of the survey is to study and understand what the current picture of state (federal)/county funds, according to consistent target definitions, looks like. We then hope to use this information to look at understanding the levels of service provided, how to begin to define eligibility and benefits, state/county cost sharing and later, rate structures. This survey data will obviously be only one source of information used in this study process.

We urge your cooperation in this effort. It's important that we have consistent statewide information from all counties now and in the future as we move forward with development and implementation of the Visions proposal. If you have any questions, please contact any of the county members of the Visions Data Reporting and Transitional Funding Workgroup listed in the attachment. A summary of Frequently Asked Questions (FAQ) for completion of this survey will also be included on the DHFS website at: <http://dhfs.wisconsin.gov/aboutDHFS/OSF/AreaAdm/OsfAreaAdmVisions.HTM>

**Please submit the completed survey forms for 2001, 2002 and 2003 electronically to Jane Hilgers at [HilgeJA@dhfs.state.wi.us](mailto:HilgeJA@dhfs.state.wi.us) by June 7, 2004.**

Attachments: County Visions Proposal  
Visions Guiding Principles  
Survey Instructions and Definitions for CY 2003  
Survey Forms for 2001, 2002 and 2003  
County Contacts on Visions Data Reporting and Transitional Funding Workgroup

cc: Bill Clingan, Director of Workforce Solutions, Department of Workforce Development  
John Marx, Deputy Administrator, Division of Energy, Department of Administration  
Charles A. Tubbs, Administrator, Division of Juvenile Corrections, Department of Corrections  
Helene Nelson